

SCRUM Meetings

The definitive guide to optimizing your teams with Agile SCRUM meetings – from development to sales and everything in between.

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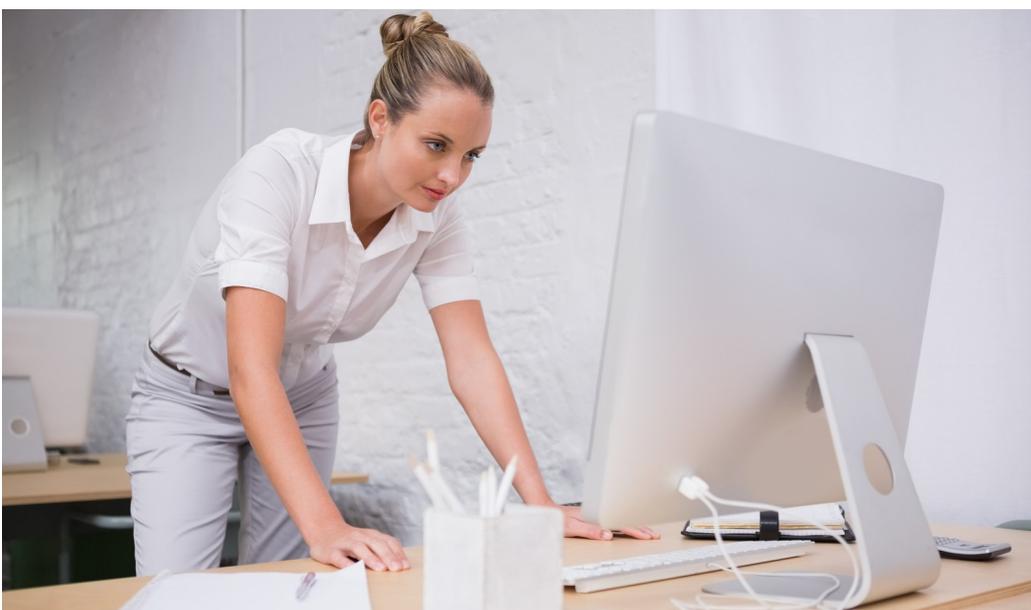
Starting With Agile

An agile review of Agile methodologies

Agile is a group of software methodologies designed to optimize software development projects around self-organizing teams. There are many methodologies around Agile but the concept is just as the name implies, you need to be agile — self-organizing, light on procedure and policies, and most importantly, provide a steady stream of incremental accomplishments moving your project forward daily. The opposite of Agile would be the processes used by every traditional big company to implement everything!

There are many methodologies around Agile principles and no one will use them all. Each team and project must determine which principles will work for them, often adjusting their process as the project moves forward. Small teams can be very efficient if they are given the ability to self-organize with the proper oversight. Think of Agile as small, incremental changes which get pushed directly to the end-consumer on a daily or weekly basis. This does mean that all product features won't work every day, but as weeks go by, more and more of the full functionality is plumbed in until the entire product or project is completed.

Agile is a group of software methodologies designed to optimize software development projects around self-organizing teams.



To get started using Agile methodologies, first remove everything that is not agile — Gantt charts, status meetings, redundant layers of management, and excessive policies. You should trust your team, trust their judgment, and trust their skills.

Second, communication is key to optimizing Agile teams. Many large corporations struggle with Agile because they are limited by restrictive communication policies. Every successful Agile team needs an Agile-based project management system (we use [Trello](#) and [JIRA](#)), access to instant messaging (we use Slack and Skype), ability to conduct real-time audio and video conferencing (we use Skype & Hangouts), and an easy-to-use screen-sharing platform (we use Join.me, Skype and Hangouts.) Now, imagine getting approval from management to leverage these platforms in a large corporation — it probably won't happen.

Third, break tasks into daily-sized pieces. Every product feature does not need to work every day, some will be missing or broken, but Agile is about making small, incremental changes daily. Ideally, push those updates right to your users. Because you are pushing code which will have bugs and limited functionality, make absolutely sure your users understand what they are getting and why. Consider calling it an “Agile Beta” or push to a small set of users until you build up a critical mass. Remember, small changes - validate with users - adjust direction - small changes - repeat.

And finally, your team needs to implement a SCRUM meeting policy. In short, a SCRUM meeting is a quick, once-per-day check-in for your entire team, ideally face-to-face but it could be virtual as needed.

One benefit of Agile development is the ability to get a product in front of users or customers much earlier in the implementation process to solicit their feedback. There is an acronym called MVP which a lot of entrepreneurs pursue as their first version goals. It stands for “minimal viable product.” The translation for those non-techies is, what's the minimum amount of features required to have something valuable to your customers, and start making money? With Agile, that's often your only goal: what's your MVP?

...first remove everything that is not agile — Gantt charts, status meetings, redundant layers of management, and excessive policies.



Implementing Agile SCRUM For Development

A look into successful implementation of accountability

Our development group is small, and as such doesn't need a ton of "process" to keep projects moving forward. However, since having no process is never a good idea either, we have adopted various Agile methodologies and added our own spins. At the heart of Agile are daily meetings call SCRUMs.

Before we adopted SCRUM meetings, we had the more traditional weekly status meeting where everyone in the company sat around the conference room table and provided some kind of an update on what they had done the previous week. This meant that the sales department provided their update, the development department provided their update, our support team provided their update, and management provided their update. Most of the time the updates were only relevant to the other members of the reporting team, which meant we were always wasting at least half the staff's time with every update.

Another problem that a weekly status meeting has is that staff are reluctant to talk about negative things in front of the entire team. Therefore updates were filtered and issues were buried instead of discussed.



What do I get accomplished today?

We also made up the term “SCRUM-worthy” which can be used to keep discussions on topic. Subjects which are not SCRUM-worthy are taken offline to keep the meeting running smoothly.

Taking a cue from Agile methodologies, we got rid of our weekly status meeting and replaced it with department-specific SCRUM meetings. Instead of meeting weekly, each department now meets daily - yes daily. Our developers and support team meets Monday through Thursday for 15 minutes each day while our sales team meets twice a week for 30 minutes.

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- Everyone is expected to come prepared for the meeting — complete with notes — and we stay on topic with a designated facilitator. Our facilitator keeps notes and holds everyone accountable to their progress and goals. Our agenda is always the same:
 - **Question 1:** What do I get accomplished today?
 - **Question 2:** What am I going to accomplish tomorrow?
 - **Question 3:** What roadblocks or issues am I running into?

We also have an open policy such that anyone can join any other department’s SCRUM meeting if they have an issue or simply want to listen into the progress being made. For example, any developer is welcome to jump into our sales SCRUM and provide a technical update to the sales team.

Our cumulative weekly meeting times have not gone down at all; in fact, for some of us the time has increased because they are sitting in on multiple team SCRUM meetings. But our overall communication has improved significantly. A few observations which we have made:

- Departments are more likely to share issues among their team members, which increases our ability to collaborate solutions as a team. This was a huge problem before.
- Setting daily goals and jointly holding each other accountable has increased our progress on tasks.
- Have a designated facilitator helps keep on group on topic and improves the overall meeting pace.
- When issues come up, we can collaborate on them that same day, which eliminates time wasted while people spin their wheels and not ask for help.
- Using a shared project management system along with daily SCRUM meetings, tasks can be easily planned, reviewed, adjusted and completed daily — not weekly.
- The process naturally creates knowledge overlap of tasks so if someone needs to jump onto a task, they already have the background necessary to pick it up.

Optimize Your Agile Team Through Accountability

Complete SCRUM meeting policies

Our development team has been leveraging SCRUM meetings for about a year with great success. We have gone through three major revisions over that time and we're very happy with our current process. The previous chapter discussed how our development team implements our Agile process through SCRUM meetings. This chapter will share our template and framework which can be adapted for your development team, the Appendix has the full template.



The most challenging part for us was incorporating accountability into our process. Not that our team wasn't accountable, but rather getting each member to set their own daily goals, execute those goals and stay accountable to the entire team was difficult. Without a platform, it was impossible to measure and monitor our success.

If you are ready to implement our strategies with your team, I have outlined the steps.

Step 1: You're in charge (or at least let's assume that's true.) This is the new policy and it needs to be conveyed accordingly. Without buy-in by the entire team, you'll get nowhere. If you don't have the authority to change policies, draft a plan to take to whoever is in charge and convince them that your process is broken and you've got the answer.

Step 2: Document the SCRUM policies. Keep this extremely short; after all, Agile development is all about small, incremental steps, so why would the policy be any different? I put my less-than-one-pager template in Appendix A; you can model yours from that. Take it, modify it, use it.

Step 3: Set a date and time for your SCRUM meetings. I suggest meeting four days a week, Monday through Thursday. Pick a time which is best for your team. Keep in mind when your team may be the most productive, and DON'T pick that time. Our SCRUM times are 4:45pm each day. There are two advantages to this time: people are worn out at the end of the day and probably just running down the clock anyway, and you have a forced "15 minute" window because no one wants to stay late.

Step 4: Pick a SCRUM leader or facilitator. This should be someone who is good at keeping notes and has great attention to detail. The facilitator will make quick notes of everyone's tasks (preferably, type them directly into a project management system like [JIRA](#) or [Trello](#)). The facilitator will ensure that what you said you were going to do tomorrow actually gets done. They don't need to be a dick about it either- things come up and tasks slip.

Step 5: As the management, it is your job to see the big picture and make sure everyone is working at their optimal performance toward your business goals. You need to attend every SCRUM meeting and constantly assess and adjust the tasks and priorities as necessary. You also need to make quick decisions; don't let decisions sit for a day because it holds up your team.

Step 6: People don't like to talk about being behind or stuck on a task. You must break that mindset — if you don't your SCRUM meetings won't work. Your team needs to be open, supportive and leverage collective knowledge. Developers understand that things come up, tasks turn out to be more challenging than anticipated, and deadlines will slip — accept it!

Step 7: Assess your team's SCRUM policies after 30 days and adjust what is not working. Re-assess again every 30 days and keep adjusting. Solicit feedback directly from your team as well; don't assume it is working for them.

Follow the processes provided here and you may be surprised at the success you'll have by simplifying your process.

Once you've had success with one team, consider bringing the same process to every other team in your organization.

Sample Development Policy Template

SCRUM Methodology

- *Everyone needs to be honest about their struggles so we can all help address them.*
- *The style of this format creates accountability by the team. If someone plans on doing something tomorrow but fails to do so, we want to discuss the issues which prevented the task from getting done.*
- *Only SCRUM-worthy tasks will be discussed, others will be spun off into a separate meeting.*
- *Continue to leverage project management.*
- *The team will be defining weekly or bi-weekly goals which we'll write down and review weekly.*
- *Remember, these are YOUR meetings - we are here to facilitate and help everyone fulfill their best potential. If you are unable to accomplish a task, then let's address the reasons why, fix them and move on.*
- *Report on any issues or stumbling blocks you are encountering*

This is a simple, one page policy that you can use and modify to meet the needs of your developer's SCRUM policy. We chose to format it as a bullet list so that it can be more easily digestible than a long-hand written document. Remember, Agile is all about being efficient, bullet lists are very efficient.

Dev SCRUM Meetings

- 4:45-5:00pm Mon-Thur
- Dev Team, everyone else is welcome to attend any meetings
- Name a person as your facilitator
- All tasks will be put into project management system

SCRUM Format

- As a standard, SCRUM meeting are held as a standing meeting (avoid sitting around a conference table)
- Each participate needs to spend a few minutes before the meeting and prepare
- Round-table for all participants providing commentary on the following three questions:
 - 1) What did I accomplish today? (since this is at the end of the day)
 - 2) What will I do tomorrow?
 - 3) What obstacles are impeding my progress?

Implementing Agile Processes In Sales Teams

A look into our successful implementation of accountability

An efficient sales team is critical to your organizations success. While this isn't rocket science, I feel that if we don't document the process, it won't be followed and we lose accountability. With a policy document, you can always just point to it and say "do it that way."



Taking a lead from our development team, we implemented an Agile-style SCRUM meeting with our sales team. Half of our team are remote and it is a bit more difficult to lock them all down daily so we implemented two 30-minute SCRUM meetings per week. These are mandatory meetings for the team so they know not to schedule other meetings at that same time. Our team leverages Join.me (Skype, GoTo Meetings or others meeting collaboration services will also work) to host our meetings, even though half are in the same office.

What do I get accomplished today?

Your sales team needs to be free to sell and the process must be beneficial to the success of them selling. Too much, or too little, policy may interfere with their ability to spend their days selling; adjust as you go. A sales representative should spend 90-100% of their day doing sales; make sure that this is true in your company.

To run a successful SCRUM meeting, you need to designate one person as the facilitator. The facilitator's job is to keep the meeting on topic and pace, log all tasks, and keep the team accountable regarding priorities. Each sales associate will cover the following five topics during each SCRUM meeting:

- **Update 1:** Provide a status update/report on their "Top 5 Opportunities"
- **Update 2:** Briefly update everyone on new "SCRUM-worthy" prospects
- **Update 3:** What are they planning to do today and tomorrow (since we meet every other day)
- **Update 4:** Report on any issues or stumbling blocks they are encountering
- **Update 5:** Ask what others on the team can do to help move sales forward, we're all in this together!

As part of our sales SCRUM, we also implemented a "Top 5 Opportunities" list, which are those opportunities that each sales person is going to focus the majority of their attention on in the next one to two weeks, or until they close. The reason for picking 5 — or maybe it's 10 or 20 for your team, but definitely not all — is to provide small, agile incremental goals to your sales. Having clarity on your goals is the best way to success.

Our team uses [Pipedrive](#) as our customer resource manager (CRM) system where each lead, prospect and opportunity is tracked. During our SCRUM, we filter by top opportunities being pursued as well as new leads and each lead is covered. Ideally, each team member keeps their update to 7-10 minutes; a quick pace will help avoid losing people's attention.

In addition to our Pipedrive, all related tasks are entered directly into a project management system — we leverage [Trello](#). Your facilitator will manage the tasks, requests, updates, and close those which have been completed. Every sales team needs a project management system.

If you struggle with keeping your sales team focused on priorities, you should apply this format and process to your business as well. Keep in mind that Agile is not about one process but rather a collection of self-directed methodologies. Adopt, morph, and execute based on your team's needs. If you are fighting process and fail to get buy-in by your team, you probably have too many policies.

Optimizing Your Sales Team with Agile Methodologies

Complete SCRUM meeting policies

Evangelizing what you do is fun and makes you feel good, but often creates a false sense of sales accomplishment. In general, people are nice and won't outright tell you they don't need your product or service, which is too bad because that would save us all a lot of time. Instead, they offer to follow up in a few weeks, or ask for more information which starts the process of you wasting time on prospects with zero chance of ever closing on them.



Traditionally speaking, sales teams don't exist; instead there are a number of sales team members operating in complete isolation from one another. This is partially because sales members are compensated based on the sales that they close and there is zero incentive to help either other out or jointly pursue opportunities. While this trend won't likely end anytime soon, it does cause difficulties when building a collaborative sales policy.

Instead of focusing on a collaborative sales team we'll instead work on sales team communication, and policies which will allow your team to optimize their work flow, and then slowly migrate them into a collaborative team.

If you are ready to implement our strategy with your team, I have outlined our steps:

- Step 1:** Define everyone's roles. Roles are different than job titles; you may actually have multiple roles being filled by the same person, or many people filling the same roles. We defined the following role titles: sales representative, pre-sales engineer, sales manager, project manager, developer, and support. Your roles may differ but each role needs a definition of responsibility.
- Step 2:** Specifically document your business' key markets. Sales representatives will often chase any revenue at all because they are compensated for a sale regardless of whether or not it's a good sale. Scattering your resources across too many industries will fragment your penetration, making new sales more difficult. Define the key markets that your business will pursue, and clearly state that these are the only markets to be pursued by your sales team. During your SCRUM meetings, every lead needs to be compared against these key markets.
- Step 3:** Set a date and time for your SCRUM meetings. I suggest meeting twice per week. Pick a time which is best for your team. Keep in mind when your team may be the most productive, and DON'T pick that time. Our sales SCRUM meetings are held at 3:00pm on Tuesdays and Thursdays. Your sales policy will define this meeting as mandatory for all involved in sales.
- Step 4:** Outline your CRM policies. Every sales team needs an efficient CRM platform; without one you rely too much on the team's memory and have no way to measure success. Your policies must include how leads are documented, where notes are stored, and how the team interacts with each other. Leverage your CRM during each SCRUM to ensure all opportunities are moving forward.
- Step 5:** Define your specific sales process. Outline each step in your sales process and build a flow chart. This process needs to go from lead to successful sale while defining every step, branch and stage in between. This will take multiple interactions depending on your sales process.
- Step 6:** Now document your sales process. In addition to the flow chart, document each step and phase with what gets documented, who signs off and which roles are involved. Our flow chart contains ten steps.
- Step 7:** Setting weekly goals. Every sales team needs to have formal sales goals which are reviewed weekly. Our sales goals are defined each quarter and each year, and reviewed weekly. Each week, one of your sales SCRUM meetings should dedicate a few minutes to review your goals and make sure you are on track.
- Step 8:** Define each sales representative's top 5 opportunities. If a sales member is managing 20 leads, it can be impossible to give each of them the attention necessary to succeed. Allow each sales representative to define their top opportunities, it might be 2 or 5 or 10, but it needs to be manageable for your sales process. These are the top opportunities that each sales representative will touch every single day and push harder to the close than the others.

Following this process may not fit perfectly into your business, which is fine, Agile is all about making adjustments to suit your process.

Use this guide as a starting point of discussion for your team.

Sample Sales Team Policy Template

SCRUM Methodology

- *Everyone needs to be honest about their struggles so we can all help address them.*
- *The style of this format creates accountability by the team. If someone plans on doing something tomorrow but fails to do so, we want to discuss the issues which prevented the task from getting done.*
- *Only SCRUM-worthy tasks will be discussed, others will be spun off into a separate meeting.*
- *Continue to leverage CRM.*
- *The team will be defining annual, quarterly and weekly goals which we'll write down and review weekly.*
- *Remember, these are YOUR meetings - we are here to facilitate and help everyone achieve their best potential. If you are unable to accomplish a task, then let's address the reasons why, fix them and move on.*
- *Report on any issues or stumbling blocks you are encountering*

This is a simple, one page policy that you can use and modify to meet the needs of your sale team's SCRUM policy. We chose to format it as a bullet list so that it can be more easily digestible than a long-hand written document. Remember, Agile is all about being efficient, bullet lists are very efficient.

Sales SCRUM Meetings

- 3:00-3:30pm Tue & Thur
- Sales Team attendance is mandatory; everyone else is welcome to attend any meetings
- Name a person as your facilitator
- All sales will be tracked in your customer relationship manager (CRM)

SCRUM Format

- As a standard, SCRUM meeting are held as a standing meeting (avoid sitting around a conference table)
- Each participate needs to spend a few minutes before the meeting and prepare
- Round-table for all participants providing commentary on the following three questions:
 - 1) Status update on top 5 opportunities
 - 2) Update on new top or "SCRUM-worthy" prospects
 - 3) What you are doing today & tomorrow
- Ask what others can do to help you move your sales forward, we're all in this together!

This eBook covered various ways to implement an Agile SCRUM meeting process for your business. Agile is more of a mindset than anything, and the sooner you can get your team on board with a different way to think about meetings, communication and process, the more agile your team becomes.

Communication is the most important and complex aspect of any team, and as their manager, it is your responsibility to provide them with the best platforms to optimize communication. Without communication, you don't have a team — you have individuals working independently without oversight or direction.

Agile is all about finding the best processes for your team. We covered only one aspect of Agile — the SCRUM meeting. Our team has refined our process as an efficient system which bridges multiple departments — development, support, and sales. Experiment with your team and make small, incremental changes, re-evaluating often. Keep reminding your team that they are all in it together; they need to cooperate to be a unified team and succeed.

Your team will not adopt a new process overnight, so don't give up if you cannot get initial buy-in. Identify your early cheerleaders and seek out their enthusiasm and guidance; chances are that being on the “inside” of the team, they have additional insight you lack as their manager. Always be genuine, take their input and criticism, adjust your process and push forward with new adjustments. You will have more success if your process is documented and easy to follow, so make sure your operations are well communicated for your team to understand.

Lastly, don't hesitate to seek an outside consultant to assist in your transformation. Your business's success is completely tied to your team's ability to communicate efficiently, so spare no expense to make them efficient.

I have been fascinated by optimizing our SCRUM processes and would love to hear about your success or strategy. Please send me a Tweet at @wbushee, or drop me an email. After all, shouldn't we all leverage agile processes?

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